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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

November, 1988

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer
Governor

J. Randall Evans
Secretary

LABOR MARKET DIMENSIONS
NOVEMBER, 1988

MARYLAND

UNEMPLOYMENT HEADS DOWNWARD

The slight apprehension which surfaced in October when the jobless rate took an unexpected upturn eased somewhat with the downward movement in November's unemployment estimate. Joblessness in the state dropped back from 4.6 percent in October to 4.4 percent in November, a decline which helped to erase a portion of the 0.4 percentage point increase that occurred in October.

Last year, the jobless rate in November, although lower at 4.0 percent, increased over the month by 0.2 percentage points.

Maryland's lower jobless rate was triggered not only by an increase in the number of working residents but also by a decline in the labor force. During November, the number of workers on the statewide employment rolls increased to 2,370,284, reflecting a gain of nearly 2,900 persons. Meanwhile, the overall number of participants in the labor market declined from 2,482,462 to 2,478,642. The net result of November's labor market activity was a decline, of an estimated 6,700 people, in the state's pool of unemployed workers.

	November 1988	October 1988	November 1987
Civilian Labor Force	2,478,642	2,482,462	2,415,599
Total Employment	2,370,284	2,367,404	2,319,333
Total Unemployment	108,358	115,058	96,266
Unemployment Rate	4.4	4.6	4.0
National Civilian Unemployment Rate	5.2	5.0	5.6

The direction of labor market activity in Maryland during November followed a different path than that nationwide. Contrary to statewide trends, unemployment across the nation rose by 0.2 percentage points to register 5.2 percent in November. Although the number of workers nationwide rose over the month, the increasing job demands created by an expanding labor force undermined the monthly employment gains, causing joblessness to rise.

INDUSTRIAL PAYROLLS REFLECT SEASONAL ADJUSTMENTS

As the winter season began to approach, the curtailment of outdoor related activities caused a normal seasonal retrenchment in selected industries such as agriculture, food processing, construction, and amusements. However, the seasonal losses experienced in these industries were downplayed by upswings in other industries such as wholesale/retail trade and government. The net result of November's labor market activity was the addition of an estimated 7,500 jobs to the statewide industrial payrolls.

On the goods-producing side of the economy, manufacturing employment increased by an estimated 300 jobs during November. However, within the industry, performance was mixed. On the up side, job gains of 200+ occurred in both printing and publishing and in nonelectrical machinery. These and other sporadic increases helped to compensate for the continuing seasonal decline in food processing and for employment downswings in fabricated metals and in transportation equipment.

Meanwhile, in construction, the normal drop-off in building and repair activity caused employment to recede by 1,600 jobs. The loss, however, was quite lower than normal for the month. Last November, the decline in construction employment was considerably higher at 3,300 jobs.

Sizeable seasonal swings were noted in several of the state's service-oriented industries over the month. In anticipation of the holiday season, employment at trade establishments jumped by 5,700 jobs. The increase was even greater, by 700 jobs, than the expansion which occurred during November 1987 despite concern that retailers were expecting holiday buying to be off this year. Increased hiring activity in general merchandise and apparel/accessory stores, when combined, accounted for slightly more than 70.0 percent of the overall increase in the trade sector. While the overall trend was up, building material and hardware stores, furniture stores, and restaurants reported lower employment totals in November.

During November, the services industries employed 400 fewer workers, with payroll reductions reported in hotels, amusements, business, and agricultural services. Limiting the losses in the sector, however, were gains in health, social, and educational services at private colleges and universities. In the transportation/communication/utilities sector, payrolls rose by 300 jobs over the month, with gains in utility services providing the primary impetus for this monthly gain.

The employment news was favorable in the finance/insurance/real estate sector during November. Overall industry growth translated into an estimated 500 additional jobs, with increases of 100+ jobs reported in credit agencies and among insurance carriers. Lastly, in government, an across the board increase raised public sector payrolls by an estimated 2,700 jobs over the month. Although non-educational related hiring activity did occur over the month, payrolls in educational facilities were the main target for expansion.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY
BY PLACE OF EMPLOYMENT
(in thousands)

NOVEMBER 1988

Major Industry Grouping	November 1988	October 1988	November 1987
Total Nonagricultural Employment	2,079.9	2,072.4	2,045.9
Manufacturing	207.3	207.0	207.1
Durable Goods	108.7	108.7	109.5
Nondurable Goods	98.6	98.3	97.6
Nonmanufacturing	1,872.6	1,865.4	1,838.8
Mining	1.9	1.9	1.9
Construction	156.4	158.0	153.7
Transportation & Public Utilities	95.3	95.0	94.0
Wholesale & Retail Trade	532.6	526.9	527.7
Wholesale Trade	111.1	110.8	111.1
Retail Trade	421.5	416.1	416.6
Finance, Insurance & Real Estate	128.6	128.1	125.7
Services	552.5	552.9	542.1
Total Government	405.3	402.6	393.7
Federal	128.0	127.6	128.9
State	93.9	93.3	91.7
Local	183.4	181.7	173.2

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Regionally, unemployment in the Baltimore Metropolitan Area experienced a slightly larger drop than that statewide, falling from 5.2 percent to 4.7 percent. Last year, the BMA's unemployment rate, although lower at 4.3 percent, rose slightly during November. All of the BMA's local jurisdictions, with the exception of Carroll County where joblessness rose marginally from 2.8 percent to 2.9 percent, shared in November's unemployment decline. The BMA's industrial payrolls reacted similarly to those statewide, with the exception of the construction and services industries. While these sectors declined statewide, they showed a collective increase of an estimated 1,000 jobs in the BMA during November. Employment gains in trade, however, particularly in department and apparel stores, dominated the region's November job forecast.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, a net labor force increase of 577 persons during November was offset by a substantially higher employment gain of 1,600 persons. The end result was the removal of slightly more than 1,000 persons from the regional unemployment rolls and a reduction in the area's jobless estimate from 3.4 percent in October to 3.3 percent in November. The largest decline occurred in Calvert County where joblessness dropped by 0.4 percentage points to register 4.0 percent in November. Within the region, industrial payrolls were boosted primarily by continuing recall activity at educational facilities and pre-holiday hiring, particularly in retail trade establishments.

WESTERN MARYLAND

The monthly job scenario was quite different in Western Maryland where job losses in construction, manufacturing, and services dampened the overall employment outlook and contributed to an increase, from 6.9 percent to 7.2 percent, in the region's jobless rate. Despite this increase, the region's jobless rate is still considerably lower than that of 7.8 percent recorded last November. Locally, unemployment increased in all the western counties, however, the most noteworthy movement occurred in Garrett County where the impact of employment declines was compounded further by a monthly rise in the county's labor force. The end result was an increase in the county's unemployment rate from 8.2 percent in October to 9.9 percent in November.

BALANCE OF STATE

November's labor market activity in the Balance of State also showed signs of increasing joblessness. During November, overall unemployment in the region rose to 6.2 percent, up from 5.9 percent in October. Unemployment escalated in all of the shore counties, with the exception of Talbot, Caroline, and Wicomico. Somerset and Worcester, the two eastern counties most affected by seasonal employment related to agriculture, tourism, and other outdoor activities, experienced the largest increases in jobless rates. Worcester County's jobless rate was the highest in the region, topping the 10.0 percent mark.

NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--NOVEMBER 1988

Major Industry Grouping	Baltimore Metropolitan Area		Maryland Portion D.C. Suburbs		Western Maryland		Balance of State	
	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988
Total Nonagricultural Employment	1107.3	1101.2	741.5	737.3	86.1	86.5	137.4	137.3
Manufacturing	130.6	130.8	35.7	35.9	16.0	16.2	24.2	24.2
Durable Goods	72.6	72.8	18.3	18.5	7.3	7.4	8.9	8.8
Nondurable Goods	58.0	58.0	17.4	17.4	8.7	8.8	15.3	15.4
Nonmanufacturing	976.7	970.4	705.8	701.4	70.1	70.3	113.2	113.1
Construction	76.3	76.0	64.2	64.4	5.9	6.0	10.1	10.1
Transportation & Public Utilities	53.2	53.3	28.4	28.3	5.3	5.3	7.3	7.4
Wholesale and Retail Trade	274.2	271.1	199.1	195.9	23.6	23.6	37.4	37.3
Wholesale Trade	65.5	64.9	35.5	35.3	-	-	-	-
Retail Trade	208.7	206.2	163.6	160.6	-	-	-	-
Finance, Insurance & Real Estate	75.9	75.4	43.3	43.1	3.1	3.1	5.1	5.2
Services and Mining	291.5	290.8	213.0	213.3	18.6	18.7	29.3	29.3
Total Government	205.6	203.8	157.8	156.4	13.6	13.6	24.0	23.8
Federal	49.5	49.3	67.8	67.6	1.7	1.7	6.3	6.1
State	63.2	62.9	20.0	19.8	4.6	4.6	4.9	4.9
Local	92.9	91.6	70.0	69.0	7.3	7.3	12.8	12.8

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

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1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

NOVEMBER, 1988

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOV.'87
MARYLAND	2,478,642	2,482,462	2,370,284	2,367,404	108,358	115,058	4.4	4.6	4.0
BALTIMORE METROPOLITAN AREA	1,185,193	1,190,028	1,129,890	1,128,015	55,303	62,013	4.7	5.2	4.3
BALTIMORE CITY	347,513	350,519	323,191	322,655	24,322	27,864	7.0	7.9	6.7
ANNE ARUNDEL	210,872	211,317	204,223	203,884	6,649	7,433	3.2	3.5	2.9
BALTIMORE	385,583	386,731	369,256	368,643	16,327	18,088	4.2	4.7	3.8
CARROLL	59,694	59,516	57,943	57,847	1,751	1,669	2.9	2.8	2.9
HARFORD	78,482	78,672	75,081	74,957	3,401	3,715	4.3	4.7	3.9
HOWARD	88,239	88,471	85,812	85,670	2,427	2,801	2.8	3.2	2.2
QUEEN ANNE'S	14,809	14,902	14,393	14,359	426	443	2.9	3.0	2.6
D. C. AREA	984,740	984,163	951,904	950,297	32,836	33,866	3.3	3.4	2.9
CALVERT	21,947	21,994	21,061	21,026	886	968	4.0	4.4	3.9
CHARLES	46,060	46,030	44,607	44,532	1,453	1,498	3.2	3.3	3.0
FREDERICK	74,391	74,256	72,212	72,091	2,179	2,165	2.9	2.9	2.7
MONTGOMERY	417,842	417,648	406,401	405,715	11,441	11,933	2.7	2.9	2.3
PRINCE GEORGE'S	424,498	424,236	407,622	406,933	16,876	17,303	4.0	4.1	3.3
WESTERN MARYLAND	101,383	101,529	94,065	94,509	7,318	7,020	7.2	6.9	7.8
ALLEGANY	32,497	32,441	29,711	29,674	2,786	2,767	8.6	8.5	10.1
GARRETT	12,572	12,478	11,333	11,457	1,239	1,021	9.9	8.2	7.8
WASHINGTON	56,314	56,610	53,021	53,378	3,293	3,232	5.8	5.7	6.4
BALANCE OF STATE	207,324	206,744	194,423	194,584	12,901	12,160	6.2	5.9	5.5
CAROLINE	14,415	14,335	13,699	13,591	716	744	5.0	5.2	4.1
CECIL	34,847	34,658	32,529	32,528	2,318	2,130	6.7	6.1	5.4
DORCHESTER	17,982	17,664	16,681	16,565	1,301	1,099	7.2	6.2	6.3
KENT	9,711	9,675	9,291	9,291	420	384	4.3	4.0	4.5
ST. MARY'S	38,130	38,579	36,024	35,649	2,106	1,930	5.5	5.1	4.2
SOMERSET	11,772	11,714	10,604	10,764	1,168	950	9.9	8.1	10.2
TALBOT	17,461	17,362	16,969	16,620	492	742	2.8	4.3	3.0
WICOMICO	42,920	42,570	40,574	40,028	2,346	2,542	5.5	6.0	5.1
WORCESTER	20,086	21,187	18,052	19,548	2,034	1,639	10.1	7.7	9.3
UNITED STATES [1]	122,639,000	122,432,000	116,314,000	116,250,000	6,325,000	6,182,000	5.2	5.0	5.6

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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1100 North Eutaw Street
Baltimore, Maryland 21201

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